1990
HIGHLIGHTS

Research and Information Management
Ministry of Development, Trade and Tourism

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THE TOURISM INDUSTRY AND THE NATURE OF THE RESEARCH

Background:

Tourism is one of B.C.'s most important industries. There is considerable discussion as to just what the composition of the tourism industry is and how best to measure it. The debate stems from the fact that, while most industries are measured from the supply side, tourism is measured from the demand side by estimates of visitor expenditures. In addition to this, the tourist product is a less tangible one, unlike the physical products of other sectors such as fishing or forestry. The tourism experience cuts across a number of sectors in the economy such as transportation and retail trade. These factors make it difficult to quantify the economic benefits of the tourism industry. Consequently, it becomes a difficult task to make comparisons between this industry and other sectors of the economy.

Defining a Tourist:

The National Task Force on Tourism Data found it impractical to develop a single definition of the tourism consumer that could stand the test of being the industry standard. Instead efforts concentrated on defining the scope of the tourism industry, as follows:

> "The scope of the industry be defined to include the direct supply of goods and services to facilitate business, pleasure and leisure activities away from the home environment.[1]"

Throughout the industry, it is generally accepted that a **tourist** is someone who **spends a night** away from home on a trip that is taken for any reason.

While some may argue that business travel should not be included within this definition, visitor studies indicate that business travellers take part in many non-business (i.e., leisure) activities, may stay at a destination longer than is necessary for strict business purposes or may travel with family. The business visitor thus utilizes most of the same services as does the pleasure traveller. The extent of business travel varies by market and is readily available.

Excursion (i.e., same day or **not overnight**) travel represents significant expenditures for B.C. residents totalling an estimated $1.3 billion in 1989. Excursion visitor expenditures are not included in this document unless specifically identified.

The Current Methodology:

Tourism data are currently obtained from many different sources: - all levels of government and the various subsectors of the industry. Most frequently, the data are collected to meet the specific needs of those producing or paying for the information. As a result, tourism data are based on existing sources that incorporate a wide range of methodologies, reliability and

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1 National Task Force on Tourism Data, Final Report, March 1989, page 7.

detail. This makes it very difficult, if not impossible to compare, contrast, or combine the current data sources into any form of bottom line figure.

The recently completed Visitor '89 and B.C. Resident studies help to address this problem. They provide a profile of the resident and non-resident visitor to British Columbia on a year-round basis, including characteristics such as length of stay, party size, origin, regions visited, trip purpose, expenditures, and so on.

An understanding of the above discussion is essential to accurately interpret the data presented in this publication. In 1989, the Ministry undertook two studies; the Visitor '89 Non-Resident study and the B.C. Resident study. The data collected in the these two projects will provide the Ministry with a good foundation on which to base estimates of provincial revenue and volume.

Future Tourism Information:

The Ministry of Development, Trade and Tourism is currently working on the development of a Tourism Satellite Account that will make it possible to measure and evaluate the economic impacts of the tourism industry. Upon its completion this project will provide a fully integrated database/impact model of tourism activity in the province. It will establish the contribution of Tourism to overall economic activity at both the provincial and regional levels, and, in addition, be capable of estimating the impacts of increased tourism spending and tourism developments.

These new projects (B.C. Resident, Visitor '89 and the Satellite Account project) are the result of a commitment by the Ministry of Tourism to develop and provide the best data possible to the industry. While there will be ongoing improvements, it is expected that the methodologies developed will be used for many years, leading to greater accuracy and consistency of data.

TOURISM - A GLOBAL PERSPECTIVE

It is currently estimated that, worldwide, tourism is a $2.65 trillion dollar industry. The World Tourism Organization estimates that world international tourism receipts totalled $209 billion in 1989, up 8% from the 1988 total of $194 billion.[2] As such tourism represents about 5% of all global sales of goods and services and employs more people than any other single industrial sector. It is estimated that, between 1980 and 1988, international tourism receipts grew at an annual average rate of 8.4%.

Travel patterns around the world reflect not only changing global economics, but also how tourist attitudes and expectations are changing. Growth in the Mediterranean region is tapering, while France and the British Isles are experiencing high levels of growth. Visitation to the Alpine region (Austria and Switzerland), which has shown little growth since 1985, rose 8% in 1989. A similar rate of growth (8%) was also experienced by the Scandinavian countries in the same period. In North America, tourism arrivals to the U.S. were up in 1989 over 1988, but, those to Canada declined. The decrease in the numbers visiting Canada were due mainly to the strength of our currency and therefore less competitive tourism prices. Australia showed a decrease in arrivals in 1989 (down 7.5%), a particularly significant decrease given the 26% increase the previous year. This turnaround, however, marks a return to normal tourist flows after the country hosted Expo '88 as well as Bicentennial celebrations.

OECD statistics reveal that France and the U.S. had the greatest increase in tourist receipts in 1989 over 1988, with increases of 20% and 19% respectively. Greece (-17%) and Belgium-Luxembourg (-11%) showed the most significant decreases. The countries earning the most from tourism receipts were the United States (accounting for 23% of the world's total), followed by France and Spain (each with 11% of the total).

The Gulf War will have a significant impact upon world travel in 1991. Travel declined dramatically in the first quarter of 1991, but appears to be recovering in the second quarter.

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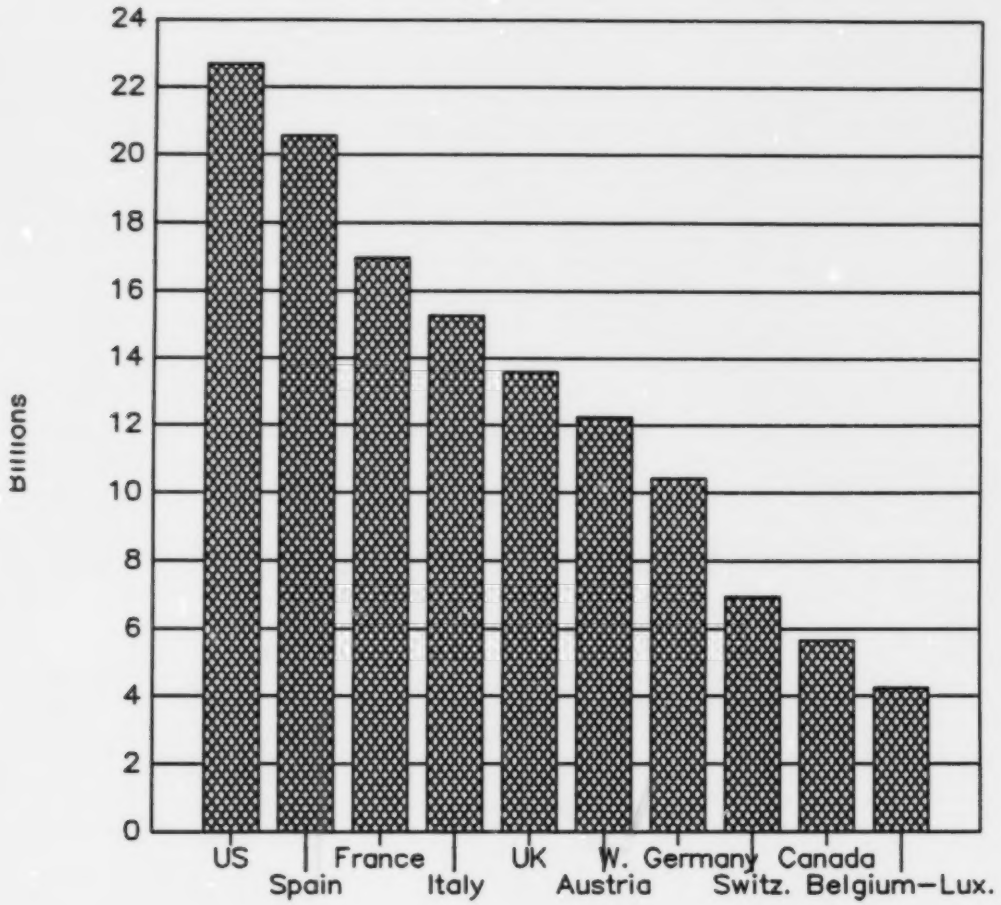
2 The Organization for Economic Cooperation and Development (OECD) is referenced throughout this publication. The OECD consists of 24 countries and accounts for 71% of the world's international tourism receipts.

The following graph illustrates Canada's 9th place position in terms of tourism income when compared to other OECD countries.

TOP TEN INTERNATIONAL TOURISM INCOME EARNERS, 1988



SOURCE: OECD

The 1989 year continued to demonstrate the increased competition that is becoming synonymous with tourism on a global (and even regional and local) basis. It is imperative that countries continually work to improve the quality and attractiveness of their tourism product, and continue to research consumer needs if they are to remain in the very competitive and lucrative tourism industry.

CANADA'S TOURISM INDUSTRY

Tourism in 1990:

Total foreign visitation to Canada showed little change in 1990 from 1989. Statistics Canada figures estimate that the total volume (including excursionists and overnight visitors) of U.S. residents entering Canada in 1990 remained unchanged with the volume staying one or more nights increasing 1%. The number of overseas visitors to Canada was down slightly at -.6%.

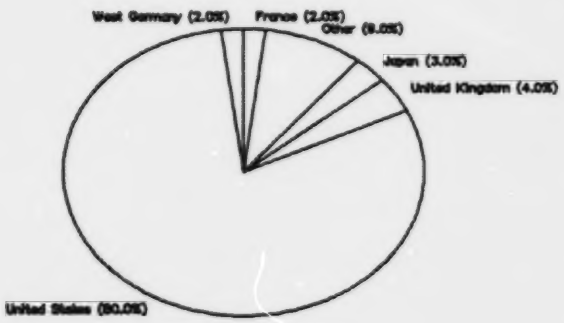
In 1990, overnight travel in Canada generated an estimated $27.5 billion in revenue, from nearly 96 million visitors. Domestic travel plays an important part role accounting for 73% of the receipts and 84% of the visitors. Next in importance to the domestic market is the U.S. market, making up 16% of the receipts and 13% of the visitors. The overseas market accounts for 11% of the receipts and 3% of the visitor volume.

Canada's main overseas markets, in order of importance, included the U.K. (19% of Canada's overseas market), Japan (12%), West Germany and France (each about 9%). These accounted for nearly half (49%) of the overseas market. However, it is of interest to note that the highest growth markets (1990) to Canada included Spain (up 18%), Venezuela (up 21%) and South Korea (up 18%).

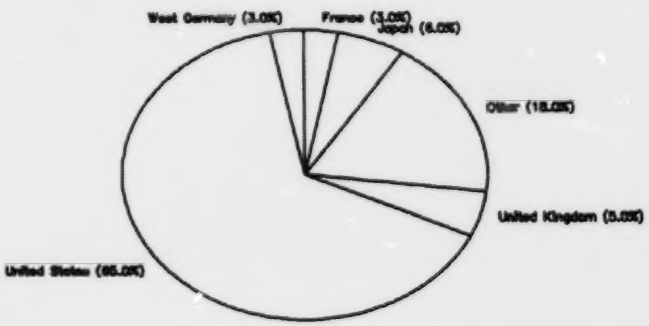
CANADA'S PRIMARY MARKETS FOR OVERNIGHT TRAVEL IN 1990

(DOMESTIC MARKET NOT INCLUDED)

% of VISITOR VOLUME



% of RECEIPTS



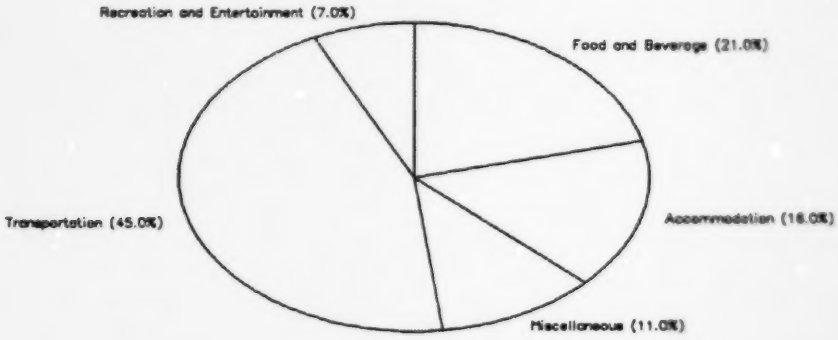
SOURCE: Tourism Canada

Economic Parameters:

It is estimated that at the core of the Tourism industry are 60,000 businesses providing direct employment for 622,400 individuals. While it is difficult to know the value of tourism to the economy, it is estimated that the industry generates nearly $11.3 billion in revenue for all levels of government.

The $25 billion spent by Canadians and foreign visitors in 1989 is broken down as is shown in the following diagram.

CANADA'S MULTI-BILLION DOLLAR INDUSTRY



SOURCE: TOURISM CANADA

Of the $25 billion, foreign visitors spent $7.4 billion making tourism Canada's third largest earner of foreign exchange behind motor vehicles and automobile parts.

Canada in the Global Picture:

While international tourism receipts grew at an average annual rate of 3.2% between 1980 and 1988, Canada's average rate of growth was 9.2 %. This growth rate gives Canada a third place ranking behind Japan (up 20.3%) and Australia (up 13%).

When Canada is examined relative to other OECD countries in terms of international market share, there are areas of concern. Between 1961 and 1987, Canada's market share of international tourism receipts has declined from 8.4% to 3.5%. The U.S. maintained its share until 1985 but declined in 1987. The United Kingdom, France and Australia have all experienced considerable growth over this 15-year period. Of special interest is Canada's market share of U.S. travel declining from 25% in 1966 to 14% in 1987 and estimated at 13% in 1990. As the U.S. market accounts for about 80% of international travel to Canada, this drop explains most of the drop in Canada's international market share.

Canada's travel account deficit has grown considerably since 1985 with the exception of 1986, the year of Expo. Most industrialized nations, due to their strong economies, have a travel deficit situation. Increased economic performance results in increased disposable income, which means increased consumer spending and foreign travel. As a result, a deficit in a country's travel account should not be used to measure tourism performance. Rather indicators such as international visitation, domestic travel and industry indicators such as revenue and capacity levels should be used.

TOURISM IN BRITISH COLUMBIA

Tourism in British Columbia is a major component of the province's economy, with over $5 billion in revenues from overnight travellers in 1990. While this is a significant increase from 1988 estimates, most of the increase is due to an increased ability to measure the impacts of tourism as a result of new research. In reality, 1989 represented a benchmark year and is not directly comparable to previous years in terms of total revenues or visitor volumes.

A major study examining the travel patterns of B.C. residents has shown that the impact of the B.C. resident travelling within the province is much greater than had previously been realized. The results of the study indicate that expenditures from overnight travel by residents contributes more than $2.7 billion to the B.C. economy. In terms of total revenues generated by visitors to the province, B.C. residents contribute 52%, with the non-resident making up approximately 48% of the overnight revenues. However, when looking at visitor volumes, residents make up 67% of the overnight volume and non-residents the remaining 33%.

It is of interest to note that the B.C. Resident Study also pointed out that 40% of overnight resident expenditures are spent while travelling outside the province. This presents both an opportunity and a challenge to the province's tourism industry to capture some of these lost revenues.

B.C. is the entry point for 19.7% of overnight visitors to Canada. B.C. and Manitoba were the only two provinces to increase their share of this market in 1989.

1989

REVENUES AND VOLUMES

	REVENUE	VOLUME
BRITISH COLUMBIA		
B.C. Residents	($) 2,621,700,000	15,613,000
CANADA		
Ontario	528,000,000	819,000
Other Canada	312,000,000	879,000
Alberta	432,000,000	1,791,000
TOTAL CANADA	1,272,000,000	3,489,000
UNITED STATES		
Washington	168,000,000	1,112,000
Oregon	72,000,000	329,000
California	216,000,000	681,000
Other West U.S.A.	120,000,000	658,000
East U.S.A	192,000,000	601,000
TOTAL U.S.	768,000,000	3,381,000
INTERNATIONAL	360,000,000	773,000
TOTAL OVERNIGHT VISITORS	($) 5,012,700,000	23,245,000

The methodology applied in calculating estimates for 1989 are based mainly on the B.C. Resident and the Visitor '89 non-resident studies.

PRELIMINARY

1990

REVENUES AND VOLUMES

	REVENUE	OVERNIGHT VOLUME
BRITISH COLUMBIA		
B.C. Residents	($) 2,700,000,000	15,613,000
CANADA		
Ontario	538,000,000	803,000
Other Canada	318,000,000	861,000
Alberta	440,000,000	1,755,000
TOTAL CANADA	1,296,000,000	3,419,000
UNITED STATES		
Washington	177,000,000	1,170,000
Oregon	76,000,000	346,000
California	227,000,000	716,000
Other West U.S.A.	126,000,000	692,000
East U.S.A	202,000,000	632,000
TOTAL U.S.	808,000,000	3,556,000
INTERNATIONAL	379,000,000	814,000
TOTAL OVERNIGHT VISITORS	($) 5.2 billion	23.4 million

NOTES:

1. Above preliminary estimates are based on the lower estimates for B.C. Resident and Canadian travel as described on page 11.
2. Per diem expenditures are assumed to increase 5% over 1989 for all markets; length of stay for each market remains the same as 1989.

1990 IN REVIEW

As mentioned earlier in this publication, tourism information and statistics are collected from a number of different sources representing a number of different interests. While this type of information should not be used to assess the current state of tourism in the province, it is useful in providing an **indication** as to how things are going. The table on page 13 and the following discussion look at some of these indicators and their implications.

A good indication for the tourism industry is obtained by looking at trends in the accommodation sector. Provincially, hotel occupancy rates were down 1.4 % from 1989 with an average rate of 68%. This value ranged from a high in Southwest British Columbia, specifically Richmond, with 81% to a low of 52% in both the Okanagan Similkameen and Rocky Mountain Tourism regions.

Average hotel room rates in 1990 were also up over 1989 by approximately 12%. Prices ranged from $105.53 in Whistler to $47.13 in the Cariboo with a provincial average of $83.29.

Statistics Canada collect data on the number of visitors to Canada based on the province of entry.[1] While U.S. visitation to Canada, and in particular to Ontario, showed little change. (Over half of the visitors from the U.S. who visit Canada for one or more nights enter through Ontario. As a result, any changes in the number of entries to Ontario is significant on a national scale.) Overnight visitors to B.C. from the U.S. were up 5% in 1990 over 1989 with the total number of U.S. visitors being up slightly over 4%.

The total number of direct entries of overseas visitors increased 5% in 1990 over the previous year. Of the five key overseas markets (see next page) the most significant growth was seen in the Japanese market (up 17%) with other markets at about the same level as 1989.

It is more difficult to forecast visitation by visitors from the rest of Canada. Westbound Rogers Pass traffic was down about 1% and domestic passenger arrivals and departures at Vancouver airport were about the same as 1989. This suggests that the change in number of overnight visitors from the rest of Canada ranged from +1% to -2% over 1989. Revenues from other Canadian visitors ranged between $1,296 million and $1,335 million.

Travel by B.C. residents is also more difficult to estimate. Provincial campground attendance was up slightly (+1%) over 1989; Coquihalla Highway passenger vehicle traffic was up 10% and ferry traffic between Vancouver Island and the mainland remained about the same as 1989. Travel by B.C. residents ranged from the same as 1989 to +3% over 1989. Revenues from overnight travel by B.C. residents ranged from $2,700 million to $2,800 million.

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1 Direct entries to British Columbia refer to those people whose first point of entry into Canada is via B.C.

It is of interest to note, that while the indicators on the following page showed growth in the industry, the rate of growth slowed considerably between 1989 and 1990. This is especially true in the overseas entries to the province. Direct overseas entries rose 15.7% in 1989 over 1988 and only 5.3% in 1990 over 1989. As the following table illustrates, the notable exception to this trend is in the U.S. visitation which had a 4.4% change in 1990/89, a full 3% increase over the previous period.

1990 INDICATORS

The following indicators represent tourism activity within specific sectors or from individual markets. The data is consistent between the years referenced, but is obtained from various external sources over which the Ministry of Tourism has little control. Interpretations of U.S. and overseas entries should be made with care as these numbers represent direct entries through B.C. border crossings and do not include adjustments used to prepare information elsewhere in this report.

	1990	1989	1988	Percent Change 1990/1989
Prov. Hotel Occupancy Rate	68.0%	69.7%	66.4%	-2.0
Prov. Avg. Htl. Room Rate	$83.29	$73.52	$67.74	12.1
Prov. Cmpgd. Attendance	2,340,621	2,326,457	2,210,374	0.6
Rogers Pass	1,330,520	1,346,758	1,421,702	-1.2
B.C. Ferries - Routes 1 & 2	9,841,906	10,068,515	9,388,620	-2.3
Van. Airport - Domestic Arrivals & Departures	5,995,683	6,011,812	5,871,498	-0.3
Coquihalla Highway	1,601,009	1,456,126	N/A	10.0
Direct Overseas[1]	720,821	684,701	591,899	5.3
Hong Kong	72,749	71,680	49,403	1.5
Japan	189,253	162,283	133,676	16.6
Australia	53,646	54,498	44,002	-1.6
West Germany	66,927	68,473	65,304	-2.3
United Kingdom	110,117	107,035	97,915	2.9
U.S. Total[1]	4,410,232	4,225,475	4,286,701	4.4
U.S. 1+ Nights	2,442,787	2,318,454	2,331,111	5.4
U.S. Vehicle Entries (Minus Trucks)	1,510,595	1,446,264	1,475,448	4.4

1 Direct entries to British Columbia refer to those people whose first point of entry into Canada is via B.C.

TOURISM: A SIGNIFICANT COMPONENT OF THE B.C. ECONOMY

Benefits to B.C.'s economy come from a number of different sectors of the tourism industry:

In 1986 the guest ranch industry generated an estimated $3.5 million in revenue from approximately 102,000 visitor nights.

The total economic impacts of the fishing lodge/resort industry in 1987 were $89.0 million of value added, $56.6 million of wage income and over 2500 person years of employment.

Of the estimated 3.8 million rounds of golf played in B.C. (1988), 500,000 of these involve "tourists", ie., golfers not resident near the course.

Total revenues from the guide outfitting industry in 1988 were estimated to be $22.1 million. This industry directly generated $13.7 million in income, $8.4 million in wages and salaries, and 475 person years of employment.

The 1989/90 ski season generated approximately $100.1 million in gross revenues for the resort businesses directly involved in skiing and employed the equivalent of more than 4200 people on a full time basis.

The marine tourism industry generated an estimated $222 million in annual revenue in 1989. Of this total, approximately 81% was generated by fishing-related operators and the remaining 19% by those operators offering a general marine experience, such as power and sail cruising. In addition, it is estimated that this industry generated an estimated 3,600 jobs.

Research conducted in 1989 indicated there were 287 facilities in the province that could handle meetings of 100 attendees or more. As the average total expenditure per meeting attendee travelling party was $978.00, the economic importance of this market is significant.

People visiting urban destinations within the province also play an extremely important role. Of the visitors to the province in 1989, 60% visited either Victoria or Vancouver. Visitors on 'city trips' spent an average of $64 per day, generating an estimated $2.0 billion in Victoria and Vancouver.

Wildlife viewing, although still in its infancy, is growing in popularity. In 1987, 17 operators earned $2.5 million primarily through wildlife viewing. An estimated additional $16.5 million was generated from wildlife viewing as a secondary component to other related tourism experiences such as river rafting.

VISITOR TRAVEL CHARACTERISTICS

B.C. Residents

The resident market generated $2.6 billion on 15.6 million overnight trips in 1989 and $2.7 billion and 15.6 million trips in 1990. These figures accounted for 53% of the overnight revenues generated by visitors to the province and 67% of the visitor volume in 1990.

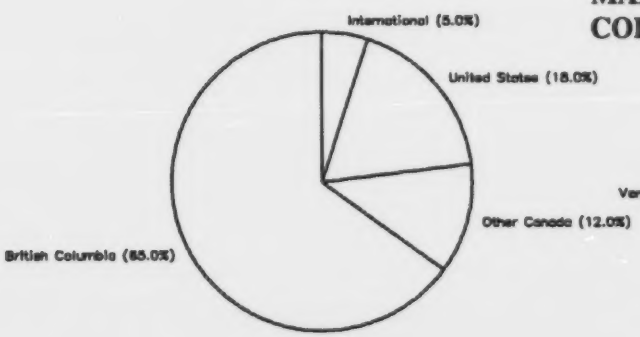
The following information relates to travel by B.C. residents in 1989.

WINTER is the most popular season for resident travel within the province (30%), with the remaining three seasons each representing about a quarter of the travel.

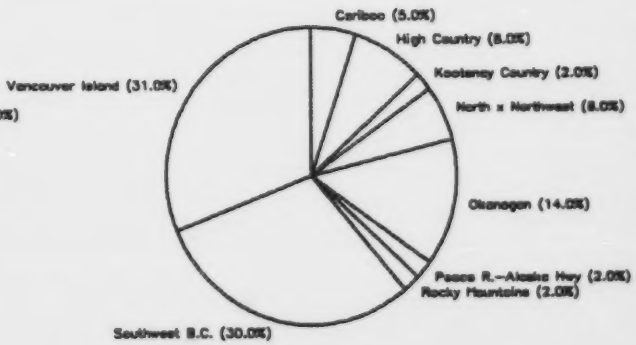
The average party size for B.C. residents is 2.62 persons which is slightly larger than the average for non residents, 2.47 persons. · B.C. residents tend to spend less and travel for a shorter period of time. However, due to the fact that there are nearly twice as many resident visitors as there are non resident, they account for more than half of overnight revenues.

Approximately half of all B.C. residents' travel is to destinations within the province. Southwestern B.C. and Vancouver Island are the most popular destinations for B.C. residents travelling within B.C.

MAIN DESTINATION OF RESIDENT TRIPS (i)



MAIN DESTINATION WITHIN BRITISH COLUMBIA



Source: B.C. Resident Study

Approximately $4 billion in revenue left the province in 1989 as a result of residents travelling outside the province. As trip expenditures are much higher when travelling outside of the province, this results in a significant contribution to the province's travel deficit. This out-of-province travel could represent an opportunity for the B.C. tourism industry, particularly in the spring and fall seasons.

Non-Resident Visitor

In 1990, the non-resident market generated $2.5 billion dollars in revenues from 7.6 million overnight visitors in 1989. Higher expenditures result in their making up 33% of the overnight visitor volume and 48% of the province's tourism revenues.

31% visit the province during the summer, with visitation in the remaining seasons ranging between 20-25% each.

Visiting friends and relatives was the main trip purpose for one-third of the parties, with sightseeing and shopping being the most popular activities.

Resident and Non-Resident Comparisons

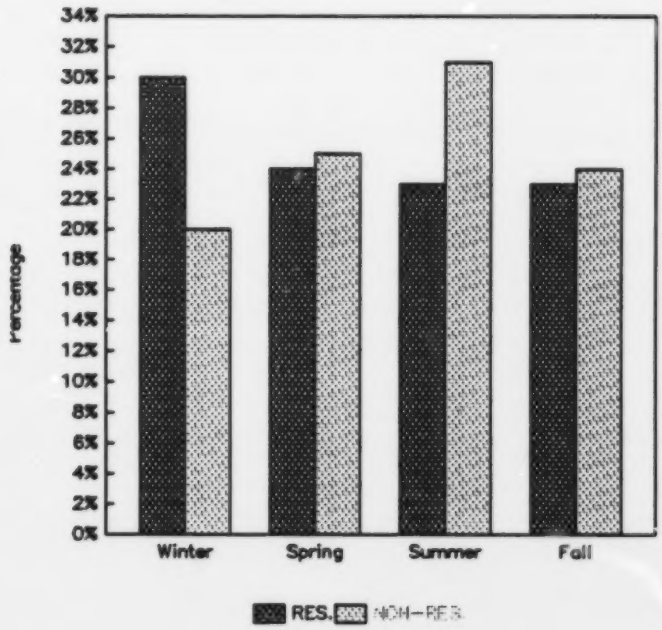
VISITOR TRAVEL CHARACTERISTICS

1989
(resident and non-resident comparisons)

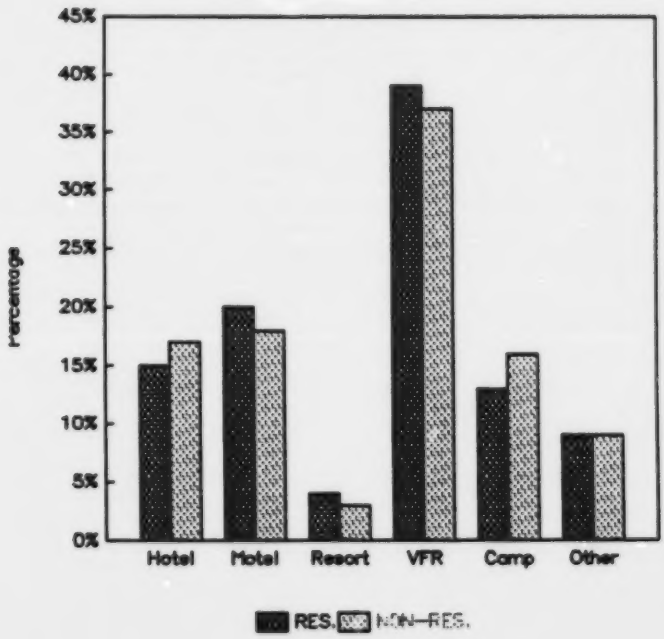
	B.C. RESIDENT in B.C.	NON-RESIDENT to B.C.
Average Party Size	2.62	2.47
Average Daily per Person Expenditure	$48.98	$54.90
Average Length of Stay (nights)	3.59	5.83
Total Overnight Volume (person-trips in B.C.	15,613,000	7,632,000

RESIDENT AND NON-RESIDENT COMPARISONS

SEASON OF VISIT



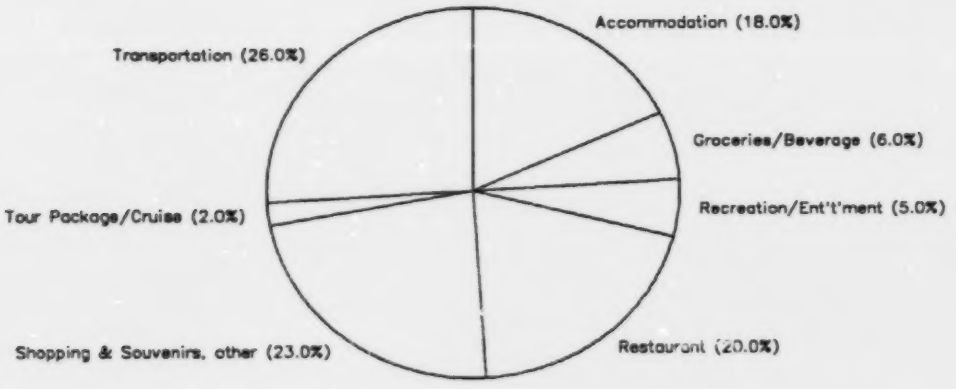
ACCOMMODATION



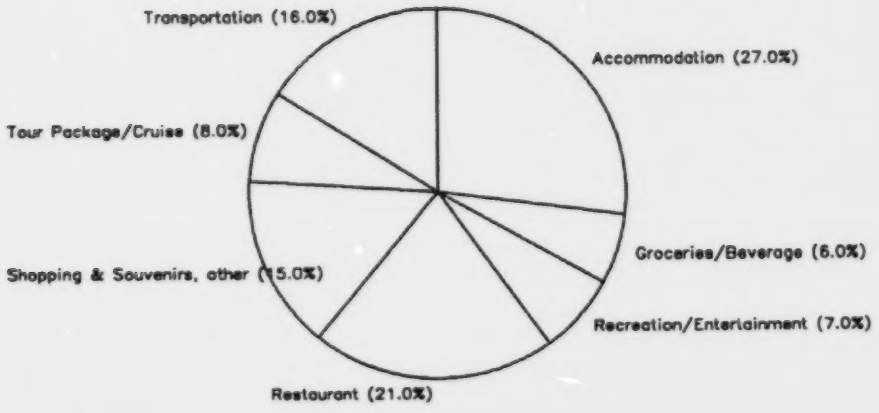
SOURCE: Visitor '89 and B.C. Resident Study

EXPENDITURE BREAKDOWNS

RESIDENT



NON-RESIDENT



SOURCE: Visitor '89 and B.C. Resident Study

B.C.'s CHANGING TOURISM PRODUCT

In the ten year period between 1978 and 1989, the percentage of parties stating that business was their main trip purpose rose from 10% to 16%.

The awareness created by Expo in 1986 is manifested in the growth in the number of rooms available in Vancouver and neighbouring Victoria and Whistler. In the 1985/6 period the number of hotel rooms in Vancouver increased 23% with an additional 5% since 1986. Between 1989 and 1992 the number of available rooms in Victoria is expected to increase by 20%.

The use of motels declined significantly in the ten year period from 30% in 1979 to 18% in 1989, while staying with friends and relatives increased considerably from 22% to 37%.

Whistler estimated a 40% increase in the number of available rooms in 1987/8 and again 1988/9.

B. C. skier visits have grown substantially since 1978. This is shown by the increase in capital investment in B.C.'s mountain resorts.

B.C.'S TOURISM MARKETS ARE CHANGING

Comparisons Between 1979 And 1989 Non-Resident Data

		1979	1989
ORIGINS			
	Canada	48%	48%
	Alberta	33%	23%
	Ontario	6%	13%
	U.S. 45%	42%	
	Washington	18%	14%
	California	11%	9%
	Overseas	6%	10%
PURPOSE			
	Business	10%	16%
ACCOMMODATION			
	Friends/Relatives	22%	37%

Trends in the U.S. Travel Market

In 1989, U.S. visitors accounted for 42% of the total visitors to British Columbia, down 3% from the 45% market share in 1979. There are various trends within the US market that offer new opportunities for tourism, including the 'baby boomers' approaching middle age and the emergence of the "getaway" market as people tend to travel on shorter holidays more frequently.

The following are a few key points that reflect the changes in the U.S. travel market that will have a significant impact on B.C.'s tourism industry:

- The American pleasure travel market is enormous with 139 million Americans 18 years or older having taken one or more overnight pleasure trips in 1989.

- While 51% of Americans indicated that they intended to spend the same amount of time on vacations in 1990 as 1989, 29% planned to spend more time. 38% planned to spend more money on vacations in 1990 than in 1989.

- The number of American pleasure travellers 18 years or older to Canada rose 3% between 1985 and 1988 but dropped 7% between 1988 and 1989.

- Touring as well as city trips have shown the greatest growth in American pleasure travellers visiting Canada between 1985 and 1989.

THE FUTURE OF TOURISM IN BRITISH COLUMBIA

- Canadians' real disposable income (a leading indicator for predicting pleasure travel volumes) grew 4.8% in 1989, 1.6% in 1990 and is forecast to decline 0.1% during the first quarter of 1991. Growth in travel will likely remain steady or will fall until an expected recovery in 1992.

- In B.C. in 1991, growth in tourism revenues is forecast to decline somewhat because of a fall in the growth of consumer spending (5.5% growth in 1991 compared with 10% in 1990). A recovery in both the U.S. and Canadian economies should contribute to real growth revenues from 1992 on.

- The Goods and Services Tax places a tax on services that had previously not been taxed and will therefore make B.C.'s (and Canada's) tourism product less competitive for price sensitive markets. This will create some difficulties for a portion of the industry until there is an adjustment.

- U.S. visitation to Canada is down due to changes in the U.S. market which Canada's tourism product is not able to meet. B.C. is better placed than other provinces to meet this demand. B.C. will have to continue to develop products for which there is a growing demand.

- The growth of the 'getaway' market[1] is substantial. 40% of adult Canadians surveyed had taken a getaway break in 1988 and 50% planned to take one in 1989. Transportation and ease of access are important to this market.

- The tourism marketplace is increasingly cluttered with advertising of current and emerging destinations. Marketing has to reach the right target audience with the right message. B.C. has considerable equity in its Super, Natural image, but this needs to be reinforced by both the public and private sectors if tourism is to continue to grow in B.C.

- Recent events in the Persian Gulf in the spring of 1991 are contributing to changing world travel patterns. B.C. could benefit from this as Americans travel less abroad and by air, but it will have a negative impact on overseas travel to Canada.

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1 A getaway market is made up of people taking shorter holidays more frequently.

B.C. VISITOR AND PRODUCT STUDIES

A variety of tourism market and product research studies are available from the Ministry's Research and Information Management Branch. Reports currently available include:

- Visitor 89 - A Travel Survey of Visitors to British Columbia including a separate report on each tourism region
- Golf Tourism in British Columbia
- Guest Ranches in British Columbia
- Fishing Lodges and Resorts in British Columbia
- Marketing and Product Development Manual for Freshwater Fishing Resorts of British Columbia
- Marketing and Product Development Plan for Freshwater Fishing Resorts of British Columbia
- Small Ship Cruising in British Columbia
- Cruise Ship Industry
- Guide Outfitters of British Columbia: Opportunity Analysis
- Rocky Mountain National Parks Utilization Study: British Columbia
- B.C. Meeting Market
- Wildlife Viewing in British Columbia: The Tourism Potential
- Marine Tourism in British Columbia: An Opportunity Analysis
- Urban Tourism in British Columbia: An Opportunity Analysis
- Guide Outfitters of British Columbia: A Strategic Plan
- Commercial Wildlife Viewing Product: A Discussion of Market and Development Potential

and those studies to be released in 1991 include:

- B.C. Resident Study
- Tourism Resource Council Study
- Assessing Tourism Opportunities: A Model for Resource Based Tourism Code of Conduct

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